

# NEXTGEN PATIENT PORTAL (NextMD) DEMONSTRATION

This demonstration reviews usage of the NextGen Patient Portal. Details of the workflow will likely vary somewhat, depending on practice policy & clinic layout, though this should give you a good idea of NextGen functionality.

This has been prepared for EHR 5.8 & KBM 8.3, but you may see some screen shots of earlier versions in the background when they are not germane to the point being illustrated. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

# Introduction

- The NextGen Patient Portal was formerly known as "NextMD." While they are moving away from this name, for the near future you will continue to see the two names used interchangeably at various spots in the program.
- Our initial usage of the portal will be somewhat basic, though more components will be added over the coming months.
- The primary advantage of using a patient portal is to provide a secure means of communication between patients and medical practices, which should be more efficient than playing "Phone Tag"—hopefully improving patient care, as well as patient & provider satisfaction.

# Introduction

- The Patient Portal originated as a separate program component, so sometimes it feels a little “cobbled on.” This is getting better, but sometimes the workflow is a bit different from the general tasking workflow—and this presents the potential for confusion for infrequent users.
- There are still some Ghosts in the Machine. While the Patient Portal isn’t perfect, it is usable as a step toward a more capable & user-friendly portal in the future.
- The portal is currently only activated for Family Medicine as a running trial. The ultimate direction the HSF takes regarding patient portals in the outpatient & inpatient settings remains to be fully determined.

# Enrollment

The enrollment process will be handled primarily by the front office staff.

Patients can be given enrollment information at the time of a visit, or over the phone—meaning that a new patient can enroll before the first visit, allowing the patient to enter medical history information ahead of time.

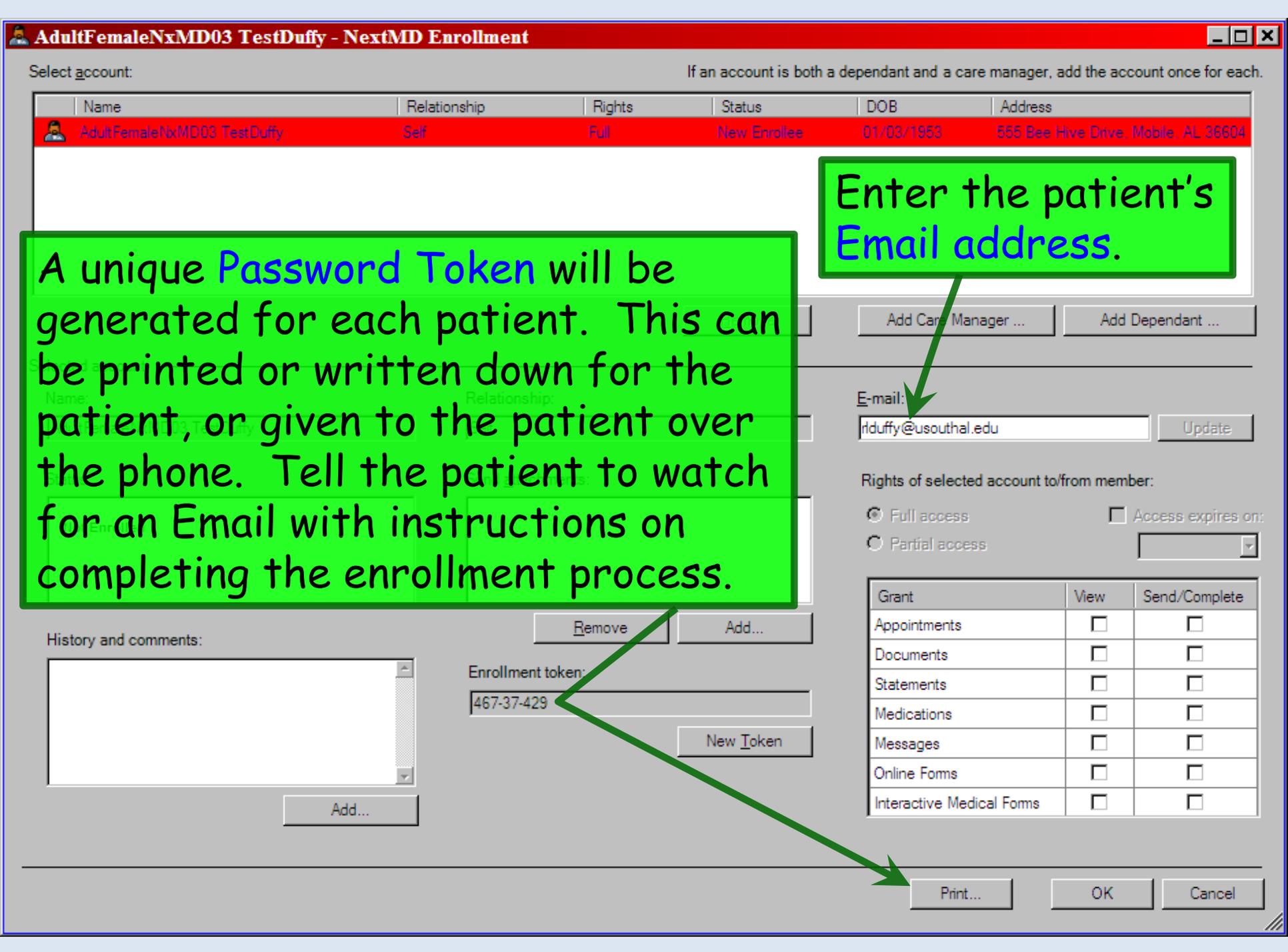
File Edit View Tools Admin Utilities Window Help

LINE DUFFY, ROBERT LAMAR MD Patient History Inbox Pa

New Select Patient... Alt + P Modify Patient... Close Patient Save Close Print Custom Print \ Fax Export Patient Documents Generate CCD... Graph Reports ChartMail Family Unit NextMD Enrollment Online Forms Interactive Medical Forms Documents Patient Education Patient Group Summary Superbill

Manage Enrollment Lock Patient Unlock Patient

To begin the enrollment process, open the patient in NextGen & use the File menu as illustrated, clicking Manage Enrollment.



Select account:

If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	Rights	Status	DOB	Address
AdultFemaleNxMD03 TestDuffy	Self	Full	New Enrollee	01/03/1953	555 Bee Hive Drive, Mobile, AL 36604

A unique Password Token will be generated for each patient. This can be printed or written down for the patient, or given to the patient over the phone. Tell the patient to watch for an Email with instructions on completing the enrollment process.

Enter the patient's Email address.

Add Care Manager ... Add Dependant ...

E-mail:  Update

Rights of selected account to/from member:  
 Full access  Access expires on:   
 Partial access

Grant	View	Send/Complete
Appointments	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>
Online Forms	<input type="checkbox"/>	<input type="checkbox"/>
Interactive Medical Forms	<input type="checkbox"/>	<input type="checkbox"/>

History and comments:

Add...

Remove Add...

Enrollment token:

New Token

Print... OK Cancel



## Welcome to NextMD!

AdultFemaleNxMD03 TestDuffy  
555 Bee Hive Drive  
Mobile, AL 36604  
rlduffy@usouthal.edu

You have been enrolled in NextMD.

Your enrollment token is: **467-37-429**. To protect the privacy of your medical information this token should be kept secret. You will be required to enter this token to complete your enrollment. Once the enrollment process is complete, you will no longer need it.  
You must complete the online enrollment process within 30 days or your enrollment token will expire.

### If you are new to NextMD, complete your enrollment by following these steps:

1. Follow the link below to NextMD.  
<https://www.nextmd.com/Enroll>
2. Enter your enrollment token **467-37-429** and your email address **rlduffy@usouthal.edu**. **Verify that your email address is correct**; otherwise you will not be able to enroll in NextMD. Contact your practice if your email address is incorrect.
3. Choose a user name and password. **Your user name and password are case sensitive.** Your user name must be at least 6 characters long and cannot be more than 20 characters long. Your password must be at least 6 characters long, cannot be more than 20 characters long, and must contain at least one number.
4. Choose a Login Security Question from the list and provide your answer for this question. Since your NextMD account contains confidential medical information that must be protected you will have to provide the answer to the Login Security Question whenever you log into NextMD.
5. Set up NextMD's secure password reset feature. NextMD will ask you to select a question and provide an answer to it. If you forget your password, you will have to answer this question again to reset it.

### If you already have a NextMD account, you can enroll in multiple practices by following these steps:

1. Follow the link below to NextMD.  
<https://www.nextmd.com/>
2. Login to the NextMD website using your original user name and password. **Your user name and password are case sensitive.**
3. From the Menu on the left, under **My Account**, click the **Manage Practices** link to go to the multiple practice enrollment page.
4. Enter your newly assigned enrollment token **467-37-429** and your email address. **Verify that your email address is correct**; otherwise you will not be able to enroll in NextMD. Contact your practice if your email address is incorrect.

This is what the printed information looks like; they'll receive identical information via Email.

Welcome to NextMD,

The staff of USA Health Services Foundation

## Notice:

As of the installation of KBM 8.3.6 on June 28, 2014, importing of online forms from patients is broken, so we should suspend sending online medical history forms until further notice.

NextGen has not been particularly helpful in correcting this flaw.

I'm leaving the instructions about online forms in place in hope that this problem is rectified soon.

Select account:

If an account is both a dependant and a care manager, add the account once for each.

For new patients who you are enrolling for an initial visit in the future, we want to send them some medical history forms to complete before that visit. Click **Add**.

Address: 333 Seeley Drive, Mobile, AL 36604

Add Dependant ...

Selected account

Name: AdultFemaleNxMD03 TestDuffy

Relationship: Self

E-mail: rduffy@usouthal.edu Update

Status: Not Enrolled

Send attachments:

Remove Add...

Rights of selected account to/from member:

Full access  Access expires on: ▼

Partial access

History and comments:

Add...

Enrollment token: 467-37-429

New Token

Grant	View	Send/Complete
Appointments	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>
Online Forms	<input type="checkbox"/>	<input type="checkbox"/>
Interactive Medical Foms	<input type="checkbox"/>	<input type="checkbox"/>

Different practices may use various sets of forms in the future. Click the + sign to expand Online Forms. (You may have to clear the Send default attachments only checkbox if the selections appear grayed-out.)

For this example, in Family Medicine, we'll check New Patient Forms-FM to send this set of forms.

Click OK then OK again to complete the process. The patient will receive some basic medical history forms to complete before the visit, speeding up the sign-in process on the day of the visit.

### Select Enrollment Documentation

Send default attachments only

- Documents (None Exist)
- Interactive Medical Forms
- Local Files
- Online Forms
  - Annual Forms
  - Chronic Dz Sample Form
  - New Patient Forms--FM

Attach File

OK

Cancel

Print...

OK

Cancel

Select account:

If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	State	DOB	Gender	Phone	Address
Ad...						L 36604

The patient will go to [www.NextMD.com](http://www.NextMD.com) and follow simple instructions to create a logon and password known only to the patient. When enrollment has been completed, enrollment status will change to **Enrollment Completed**.

Selected account:

Name: AdultFemaleNxMD02 TestDuffy

Relationship: Self

E-mail: rlduffy@usouthal.edu

Status: Enrollment Completed : 10/6/2011 8:43:09 AM

Send attachments:

Rights of selected account to/from member:  
 Full access  Access expires on:   
 Partial access

History and comments:  
Enroll submitted on 10/6/2011 6:41:38 PM (GMT) (GMT) by Robert Duffy [Duffy, Robert, 10/6/2011 1:41:38 PM]

Password reset token: 132-17-433

Grant	View	Send/Complete
Appointments	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>
Online Forms	<input type="checkbox"/>	<input type="checkbox"/>
Interactive Medical Forms	<input type="checkbox"/>	<input type="checkbox"/>

Select account:

If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	Rights	Status	DOB	Address
 ChildFemale005 TestDuffy	Self	Full	New Enrollee	01/05/2002	555 Bee Hive Drive, Mobile, AL 36604

Remove      Add Care Manager ...      Add Dependant ...

Selected account

Name:       Relationship:       E-mail:

Status:       Send attachments:       Rights of selected account to/from member:  Full access       Access expires on:

Children can be enrolled in a few ways. If the parent is not enrolled in the Patient Portal, the child could be enrolled as above, with the parent providing the Email address. The parent could then complete the enrollment on behalf of the child. This will often be the simplest procedure to follow.

Print...      OK      Cancel

**People Lookup**

Search Criteria

Last First / Nickname Middle Previous Last City Address Line 1 Zip Mother's Maiden Name

TestDuffy AdultFemale

Social Security Birth Date Sex Home Phone Policy Nbr

View By External System External ID

All Patients Exclude Expired Patients

Birth Date L4DSSN

Clear Find Close

Patient List

New

a dependant and a care manager, add the account once for each.

DOB	Address
01/05/2002	555 Bee Hive Drive, Mobile, AL 36604

Remove Add Care Manager ... Add Dependiant ...

Selected account

Name: ChildFemale005 TestDuffy Relationship: Self E-mail: rlduffy@bellsouth.net Update

Status: Send attachments: Rights of selected account to/from member:

Appointments	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>
Online Forms	<input type="checkbox"/>	<input type="checkbox"/>
Interactive Medical Forms	<input type="checkbox"/>	<input type="checkbox"/>

Print... OK Cancel

Children can also be linked to their parents & other authorized caregivers during the enrollment process. Click **Add Care Manager**, then search for the parent. When located, double-click on the name.

Select account:

If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	Rights	Status	DOB	Address
ChildFemale005 TestDuffy	Self	Full	New Enrollee	01/05/2002	555 Bee Hive Drive, Mobile, AL 36604
AdultFemaleNxMD03 TestDuffy	Care Manager	Full	Active Member	01/03/1953	555 Bee Hive Drive, Mobile, AL 36604

Remove      Add Care Manager ...      Add Dependant ...

Selected account

Name:       Relationship:       E-mail:      

Status:       Send attachments:       Access Rights of AdultFemaleNxMD03 TestDuffy account to C

Full access       Access expires on:

Partial access

The parent's name & portal enrollment status now display. Additional parents/caretakers can be added.

History

AdultFemaleNxMD03 TestDuffy was added as a care manager of ChildFemale005 TestDuffy [Duffy, Robert, 12/6/2011 5:45:55 PM]

ChildFemale004 TestDuffy was added as a...

Password reset token:      

	View	Send/Complete
Appointments	<input type="checkbox"/>	<input type="checkbox"/>
ECOs	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>
Medications	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>
Online Forms	<input type="checkbox"/>	<input type="checkbox"/>
Interactive Medical Forms	<input type="checkbox"/>	<input type="checkbox"/>

Select account:

If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	Rights	Status	DOB	Address
AdultFemaleNxMD03 TestDuffy	Self	Full	Active Member	01/03/1953	555 Bee Hive Drive, Mobile, AL 36604
ChildFemale001 TestDuffy	Dependant	Full	Active Member	08/02/2009	000 HoHoHo, Mobile, AL 36604

Remove Add Care Manager ... Add Dependant ...

Selected account

Name: ChildFemale001 TestDuffy Relationship: Dependant E-mail: rduffy@usouthal.edu Update

This can also be done the other way around. Starting with an enrolled parent, you can click **Add Dependant**, then search for & select the child. An enrollment token will be generated for the child, to be given to the parent to complete the process. At the NextMD web site, the parent will be able to communicate with the practice about herself, & also about her child.

Print... OK Cancel

Select account:

If an account is both a dependant and a care manager, add the account once for each.

Name	Relationship	Rights	Status	DOB	Address
AdultFemaleNxMD03 TestDuffy	Self	Full	Active Member	01/03/1953	555 Bee Hive Drive, Mobile, AL 36604
ChildFemale001 TestDuffy	Dependant	Full	Active Member	09/09/2000	666 U.S. Hwy, Mobile, AL 36684

These Add Care Manager & Add Dependant options are available mainly for convenience & to speed the enrollment process for the staff when the patient wants to enroll multiple family members at once. It should be made clear to the parents that each patient, whether child or adult, has his/her own enrollment. If the mother is going to use the portal to ask a question about her child, she would log on to the portal using the child's log on information.

Note that you could establish similar care manager/dependant relationships in other situations, e.g., between a demented/disabled senior & a caretaker daughter.

Select:

Name: ChildFemale001 TestDuffy

Status:

Enrollment Completed: 12/6/2011 11:33:03 AM

History and comments:

ChildFemale001 TestDuffy was added as a dependant to AdultFemaleNxMD03 TestDuffy (Duffy, Robert) 12/6/2011 11:31:21 AM

	Grant	View	Send/Complete
Appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Messages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Queries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

# Viewing Portal In Workflow

Users may need to make some configuration changes in the Workflow/Inbox to see Patient Portal messages. You also need to be able to tell when the patient is enrolled in the Patient Portal.

Work Flow [Duffy, Robert L]

ROBERT LAMAR MD

All Tasks

Due Date	Patient/Subject	Description
10/06/2011	Testduffy, Childmalenxmd...	4 to 5 Year Old Checkup Comp...
10/05/2011	Duffy, Robert lamar/IMH ...	Adult (18-65) Exam Completed ...

Time

Reason Status

Restore  
Move  
Size  
Minimize  
Maximize  
**X Close Alt+F4**  
Window Configuration...

With the Patient Portal activated, users will reconfigure their Work Flow windows to include NextMD messages. If necessary, right-click on the **Title Bar** & choose **Window Configuration**.

NextMD

NextMD

- Communications
  - Inbox
  - Outbox
  - Drafts
  - Archived
- Prescriptions
  - Inbox
  - Outbox
  - Archived
- Appointments
  - Inbox
  - Outbox
  - Archived
- Online Forms
  - Inbox(5)

Online Form Name	First Name	Last Name	Received
New Patient Forms	ROBERT LAMAR	DUFFY	9/29/2011 3:21 PM
New Patient Forms	AdultFemaleNxMD01	TestDuffy	10/6/2011 12:25 PM
Chronic Dz Sample Form	AdultMaleNxMDTest01	TestDuffy	10/6/2011 10:46 AM
Chronic Dz Sample Form	AdultFemaleNxMD01	TestDuffy	10/6/2011 11:52 AM
Chronic Dz Sample Form	ChildMaleNxMDTest01	TestDuffy	10/6/2011 1:32 PM

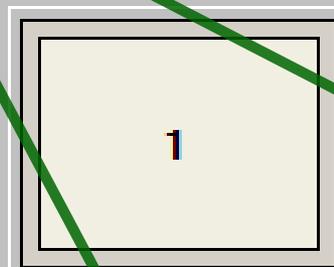
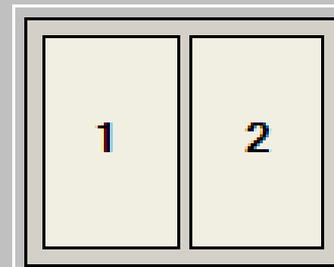
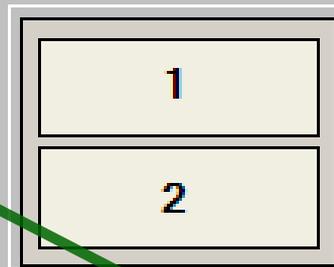
Offline

Compose Delete Add To Do Add to Chart Go to Chart

# Window Configuration



## Layout



Choose one of the 3-box configurations, then click **OK**.

## Pane #1 Configuration

Patient Appointments    To Do Tasks    Inbox

## Pane #2 Configuration

Patient Appointments    To Do Tasks    Inbox

Default

OK

Cancel



Charlese Quagmire (F) DOB: 01/02/1967 (47 years)



Address: 555 Bee Hive Drive  
Mobile, AL 36604  
Contact: rlduffy@health.southalaba...

MRN: 000900021804

Insurance:  
NextMD: Yes

Allergies: (2) Problems: (2) Diagnoses: (4) Medications: (0)

Emergency Relation:  
Emergency Phone:  
Pharmacy 1:

PCP:  
Referring:  
Rendering: DUFFY, ROBERT LAMAR ...

Patient Adult Cha... Order Admin...

When you have a patient's chart open, you can tell that the patient is enrolled in the Patient Portal by looking At the **NextMD** status on the **Information Bar**.

# Sending Forms and Documents

As mentioned above in the enrollment process, various forms & documents can be sent to the patient via the Patient Portal. This may be performed by the front office staff, nurses, or providers.

## Reminder:

As mentioned above, the KBM 8.3.6 upgrade on June 28, 2014 broke importing of online forms.

We'll let you know when NextGen has restored this functionality.

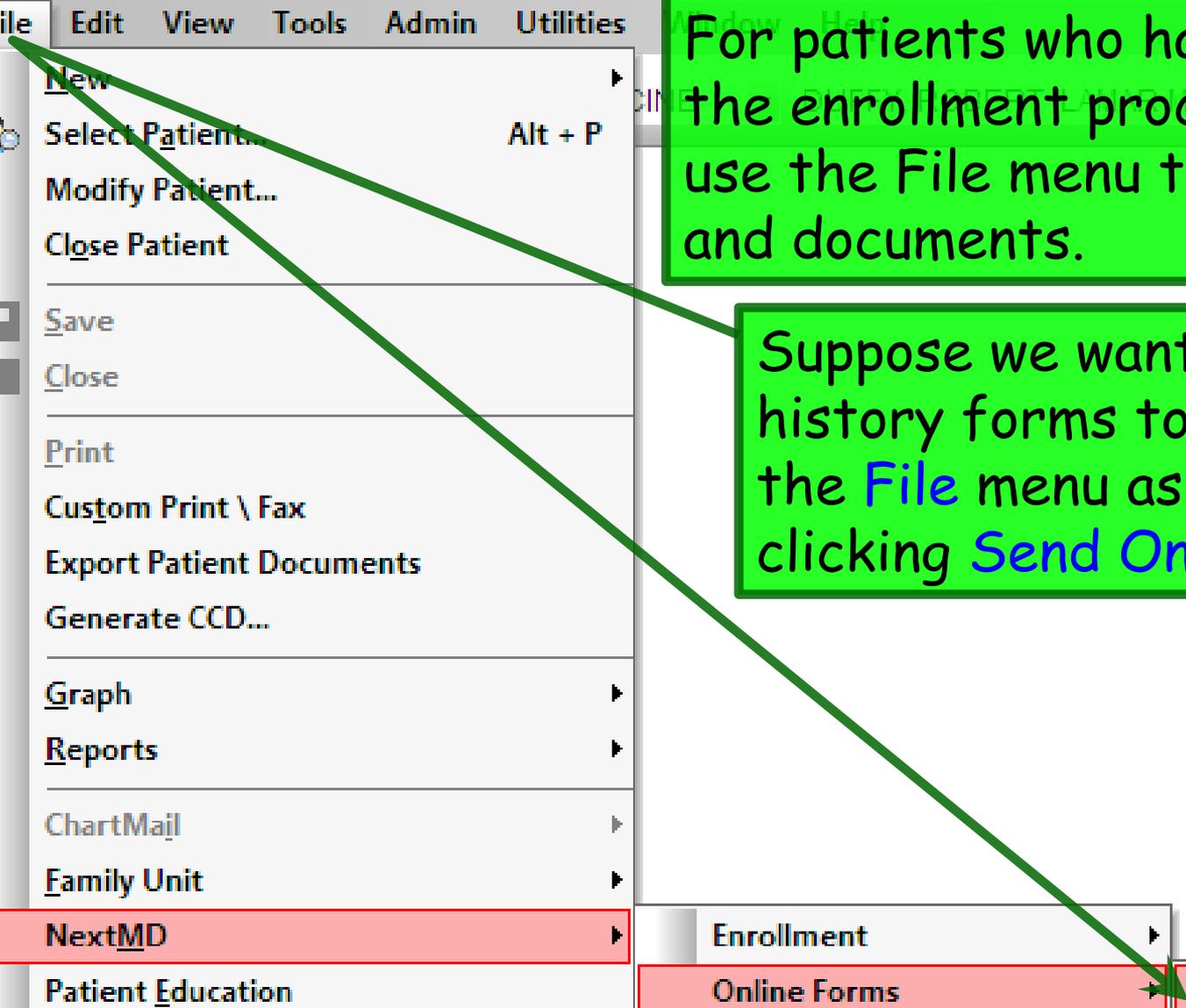
File Edit View Tools Admin Utilities

- New
  - Select Patient... Alt + P
  - Modify Patient...
  - Close Patient
- Save
- Close
- Print
  - Custom Print \ Fax
  - Export Patient Documents
  - Generate CCD...
- Graph
- Reports
- ChartMail
- Family Unit
- NextMD**
- Patient Education
- Patient Group
- Summary
- Superbill

For patients who have completed the enrollment process, you can use the File menu to send forms and documents.

Suppose we want to send some history forms to a patient. Use the **File** menu as illustrated, clicking **Send Online Form**.

- Enrollment
- Online Forms**
  - Send Online Form**
  - Import Online Form
  - Revoke Online Form
- Interactive Medical Forms
- Documents



# Send Online Form to Patient A

Patient:

TestDuffy, AdultFemaleNxMD01

Ask this patient to complete the following online forms:

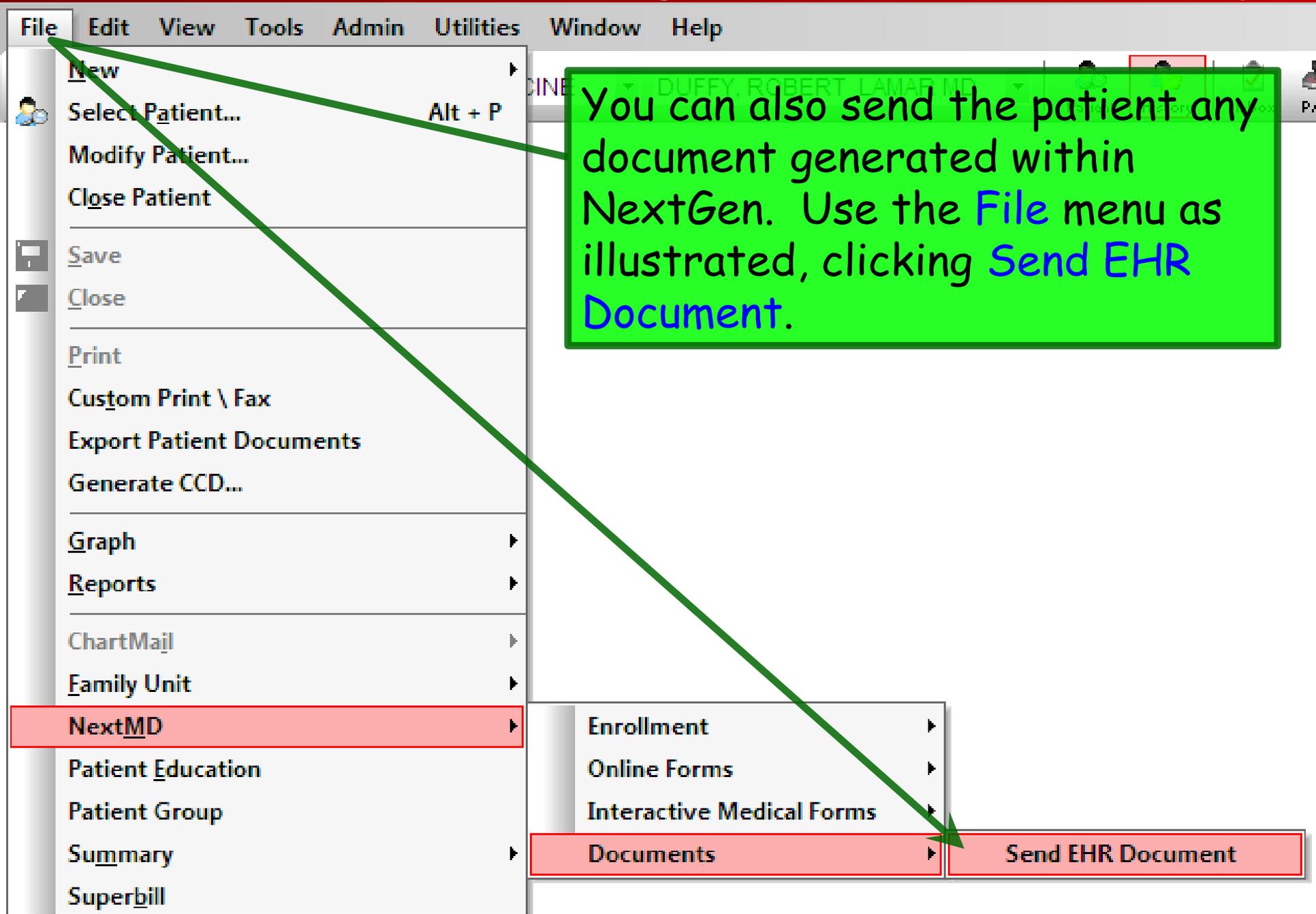
Annual Forms

New Patient Forms--FM

In the next window we'll select **New Patient Forms-FM**, then click **OK**. The patient will receive an Email asking her to log on to NextMD to view & complete the form.

OK

Cancel



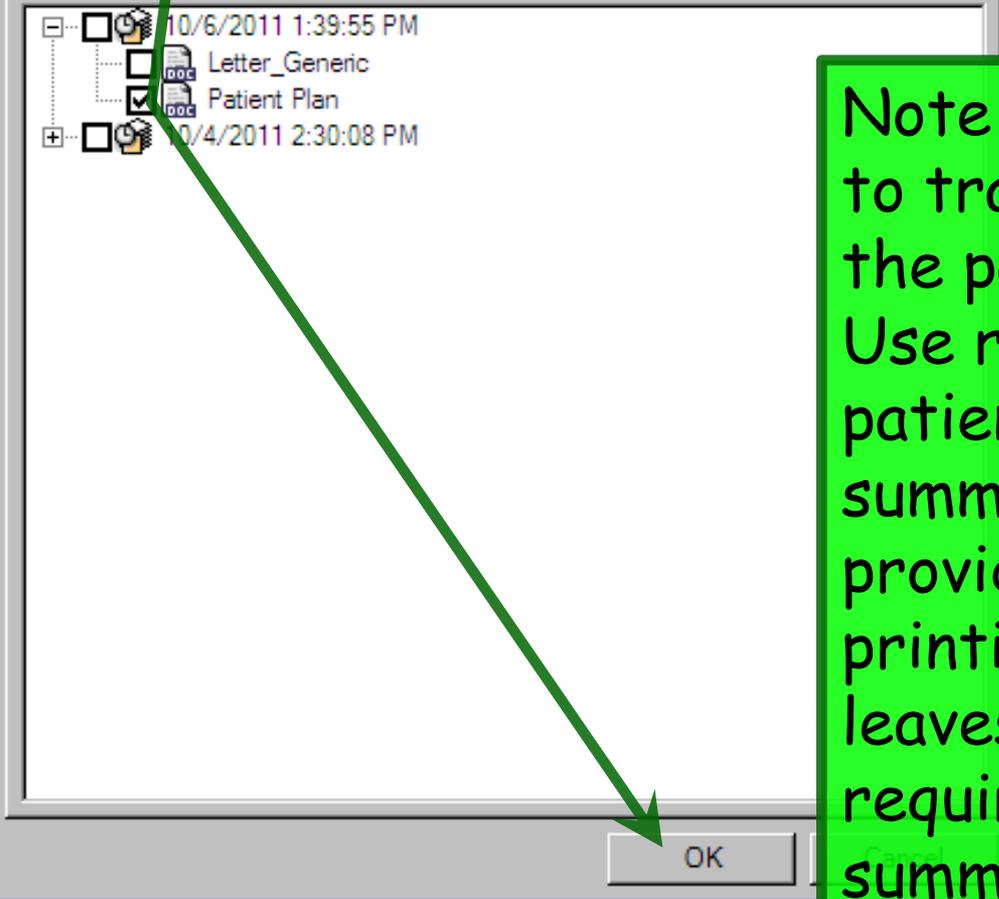
You can also send the patient any document generated within NextGen. Use the File menu as illustrated, clicking Send EHR Document.

- File
- Edit
- View
- Tools
- Admin
- Utilities
- Window
- Help
- New
- Select Patient... Alt + P
- Modify Patient...
- Close Patient
- Save
- Close
- Print
- Custom Print \ Fax
- Export Patient Documents
- Generate CCD...
- Graph
- Reports
- ChartMail
- Family Unit
- NextMD
- Patient Education
- Patient Group
- Summary
- Superbill

- Enrollment
- Online Forms
- Interactive Medical Forms
- Documents

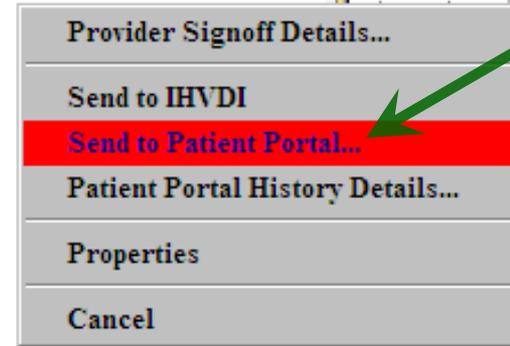
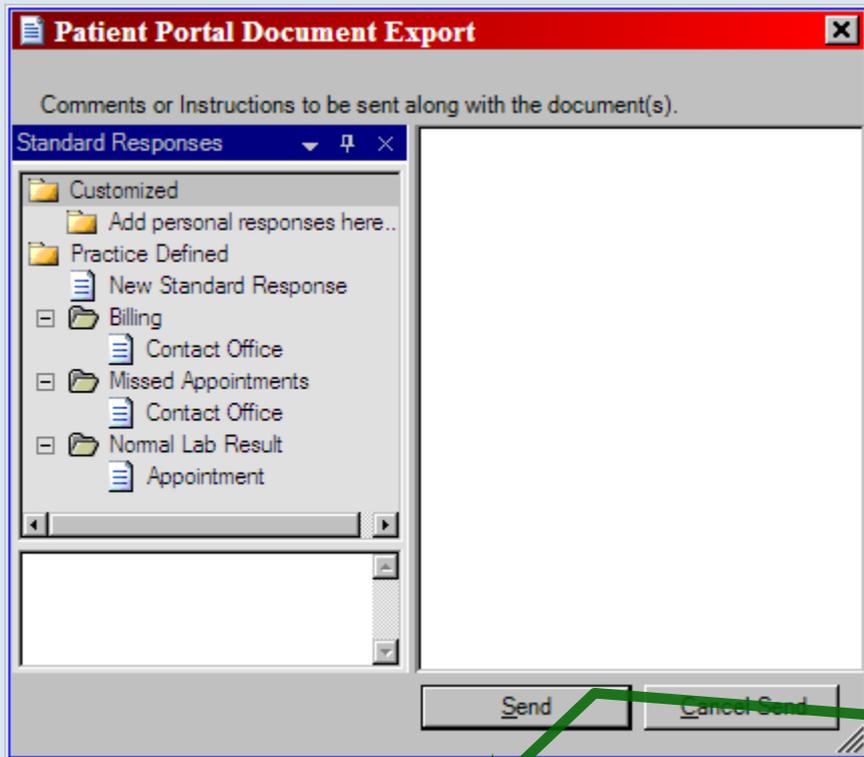
Send EHR Document

Browse through encounters, select the desired document(s), then click **OK**. The patient will receive an Email telling her to log on to NextMD to receive the document (which can be printed or saved as a PDF).



Note that one good use for this is to transmit the **Patient Plan** to the patient. While Meaningful Use requirements state that patients are to receive such summaries after every visit, many providers find the workflow of printing this before the patient leaves difficult. But these requirements are also met if the summary is sent via the portal within 3 business days.

From the History Bar, there is a simpler way to send a document to a patient. Right-click on the document, then choose **Send to Patient Portal...**



You can type a message if desired, then click **Send**. A confirmation then displays.

- New
- Select Patient... Alt + P
- Modify Patient...
- Close Patient

---

- Save
- Close

---

- Print
- Custom Print \ Fax
- Export Patient Documents
- Generate CCD...

---

- Graph
- Reports

---

- ChartMail
- Family Unit
- NextMD**
- Patient Education
- Patient Group
- Summary
- Superbill

Finally, note there is another option under the NextMD menu called **Interactive Medical Forms**. We are not using these at this time.

- Enrollment
  - Online Forms
  - Interactive Medical Forms**
  - Documents
- Send Form

# Receiving & Reviewing Forms

When a patient returns a completed form via the Patient Portal, this will need to be imported to the chart by the staff, & reviewed by staff and/or providers in the clinic.

Once again:

The KBM 8.3.6 upgrade on June 28, 2014 rendered importing of online forms dead in the water.

Don't you love it when an "upgrade" is a major step backwards?

Let's say the Triage Nurse receives notice about an Online Form in the Patient Portal Online Forms Inbox. The nurse may wish to begin by clicking the (go to) **Chart Button**. This would be particularly necessary if you wanted to figure out who the PCP is, e.g., to send a task to the PCP that the Online Forms have been received.

The screenshot shows the NextMD software interface. On the left is a navigation tree with folders for Communications, Prescriptions, and Appointments, each containing sub-folders for Inbox, Outbox, and Archived. The 'Online Forms' folder is selected, and its 'Inbox(1)' sub-folder is also selected. The main area displays a table with the following data:

Online Form Name	First Name	Last Name	Received
New Patient Forms-FM	Adult FemaleNxMD01	TestDuffy	1/12/2012 5:16 PM

At the top right of the main area are buttons for 'New Task', 'Delete', 'Modify', 'Send', and 'Chart'. At the bottom of the interface are buttons for 'Compose', 'Remove', '+ To Do', '+ To Chart', and 'Chart'. A green oval highlights the 'Online Form Name', 'First Name', and 'Last Name' columns of the table. A green arrow points from the text above to the 'Chart' button at the bottom right.

Work Flow [Duffy, Robert L]

Appointments 1/12/2012 DUFFY, ROBERT LAMAR MD

All Tasks Refills Test Results Questions

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

Due Date	Patient/Subject	Description
----------	-----------------	-------------

New Task

Date: 1/12/2012

Priority: Normal

Subject: Completed Online Formsets

Description: Patient AdultFemaleNxMD01 TestDuffy Has completed the NextMD Online Template Set New Patient Forms--FM on 1/12/2012 11:16:37 PM

Assigned: Assign To

Patient: TestDuffy, AdultFemaleNxMD Select ...

Offline

Compose Remove + To Do + To Chart Chart

NextMD

- Communications
  - Inbox
  - Outbox
  - Drafts
  - Archived
- Prescriptions
  - Inbox
  - Outbox
  - Archived
- Appointments
  - Inbox
  - Outbox
  - Archived
- Online Forms
  - Inbox(1)

You could then send a task to the provider notifying him about the Online forms. Click + To Do, then select the provider in the popup by clicking Assign To.

## Select Task Recipients

Available Users/Workgroups

Search users and groups

< Enter search string here > Search

.....  (No results)

Enter a search string to begin

Add

Remove

Clear

Task Recipients

Name

Type

On the ensuing popup, in the **Search users and groups** box, type the name (e.g., **Duffy**) & click **Search**.

OK

Cancel

When the search results display, select the correct user & click **Add**.

**Select Task Recipients**

Available Users/Workgroups

Search users and groups

Duffy Search

- Users
- Duffy, Kristina
- Duffy, Robert

Add

Remove

Clear

Name	Type
Robert Duffy	User

OK Cancel

The recipient will appear on the list on the right. When done click **OK**.

In the final screen click **Add**.

**New Task**

Date: 10/ 6/2011

Priority: Normal

Subject: Completed Online Formsets

Description: Patient AdultFemaleNxMD02 TestDuffy Has completed the NextMD Online Template Set New Patient Forms on 10/6/2011 8:14:24 PM

Assigned: Robert Duffy Assign To

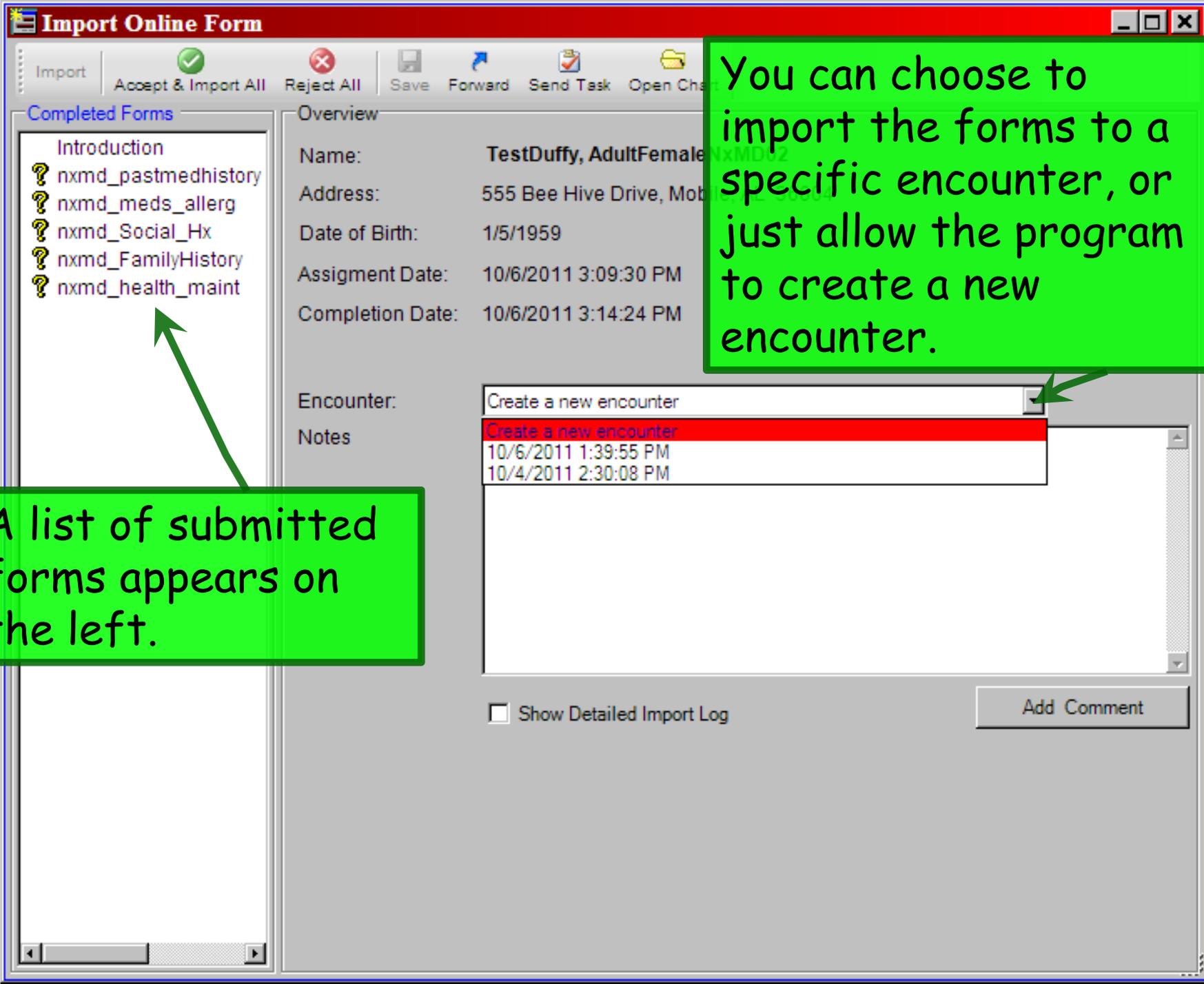
Patient: TestDuffy, AdultFemaleNxMD Select ...

Add Cancel

But whether or not you send a task to the provider, & whether or not you've opened the patient's chart, the nurse's main goal is to import the Online Form. Open the form by double-clicking on the entry (or selecting it & clicking + to Chart).

- Communications
  - Inbox
  - Outbox
  - Drafts
  - Archived
- Prescriptions
  - Inbox
  - Outbox
  - Archived
- Appointments
  - Inbox
  - Outbox
  - Archived
- Online Forms
  - Inbox(1)

Online Form Name	First Name	Last Name	Received
New Patient Forms-FM	Adult FemaleNxMD01	Test Duffy	1/12/2012 5:16 PM



You can choose to import the forms to a specific encounter, or just allow the program to create a new encounter.

A list of submitted forms appears on the left.

**Import Online Form**

Import | **Accept & Import All** | Reject All | Save | Forward | Send Task | Open Chart

Completed Forms

- Introduction
- nxml\_d\_pastmedhistory**
- nxml\_d\_meds\_allerg
- nxml\_d\_Social\_Hx
- nxml\_d\_FamilyHistory
- nxml\_d\_health\_maint

nxml\_d\_pastmedhistory

**Accept** | **Reject**

## Past Medical History

Have you ever had any of the following medical conditions?

**Illnesses:**

<input type="checkbox"/> Allergies	<input type="checkbox"/> Heart disease
<input type="checkbox"/> Arthritis	<input checked="" type="checkbox"/> High blood pressure
<input checked="" type="checkbox"/> Asthma	<input type="checkbox"/> High cholesterol
<input type="checkbox"/> Depression	<input type="checkbox"/> Kidney disease
<input type="checkbox"/> Diabetes type 1	<input type="checkbox"/> Seizures
<input checked="" type="checkbox"/> Diabetes type 2	

Past Medical History Comments:

Cataracts

Gall bladder

Heart bypass

Hemorrhoids

Knee surgery

Tonsillectomy

Tubes tied

Vasectomy

The forms can be accepted one at a time, but the Triage Nurse's main task is to import the forms. So the easiest thing to do is click **Accept & Import All**.

Appointments 1/12/2012 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
------	------	-----------------	--------	--------

All Tasks Refills Test Results Questions

Due Date	Patient/Subject	Description
----------	-----------------	-------------

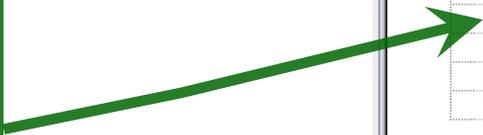
The forms are imported & posted to the patient's chart, & this item drops off the nurse's NextMD Inbox. Note you don't even have to have the patient's chart open to perform this importation.

NextMD NextMD New Task Delete Modify Send Chart

- Communications
  - Inbox
  - Outbox
  - Drafts
  - Archived
- Prescriptions
  - Inbox
  - Outbox
  - Archived
- Appointments
  - Inbox
  - Outbox
  - Archived
- Online Forms
  - Inbox

There are no patient items in this queue that require your attention at this time

When the provider opens the chart, either in response to a task, or during the first visit with the patient, the **Patient Portal forms** (actually *templates*) can be seen on the encounter.



**Patient History**

Patient Hist... Patient Dem... Categories

New Lock Search

- 10/05/2011 09:30 PM DUFFY, RL
- 10/05/2011 05:26 PM DUFFY, RL
- 10/05/2011 04:07 PM DUFFY, RL
  - Immunization - Adult
  - Immunization - Previous
  - Histories - OV
  - Patient Portal - Family History
  - Patient Portal - Health Maintenance
  - Patient Portal Medications and Allergi
  - Patient Portal - Past Medical History
  - Patient Portal - Social History
  - USA Intake-OV
  - USA Protocols
  - Allergy

Custom

Rx [Icons]

### Family History

#### Patient Input:

- Asthma
- Cancer - Breast
- Cancer - Colon
- Cancer - Prostate
- Cancer - Other
- Diabetes
- Heart disease
- High blood pressure
- Stroke

#### Other Family History:

Tsu Tsu Gamoochi

- New Lock Search
- 10/05/2011 09:30 PM DUFFY, RL
- 10/05/2011 05:26 PM DUFFY, RL
- 10/05/2011 04:07 PM DUFFY, RL
  - Immunization - Adult
  - Immunization - Previous
  - Histories - OV
  - Patient Portal - Family History**
  - Patient Portal - Health Maintenance
  - Patient Portal Medications and Allergi
  - Patient Portal - Past Medical History
  - Patient Portal - Social History
  - USA Intake-OV
  - USA Protocols
  - Allergy



Select each template and review the entries. The general rule is that NextGen tries to import anything from a check box into the appropriate part of the chart, while anything in a Comments Box will have to be manually entered by the user.

### Adult Health Maintenance

This template is only to be used by patients over the age of 18.

		Approximate Date
Flu vaccine:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Tetanus vaccine:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Pneumonia vaccine:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Complete physical exam:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Adults over 20 Cholesterol lab test (lipid panel):	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Adults over 50 Colonoscopy:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Females over 18 Pap smear:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Females over 40 Mammogram:	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>
Females over 65 DEXA scan (osteoporosis screening):	<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="text" value="//"/>

### Patient History

Patient Hist... Patient Dem... Categories

New Lock Search

- 10/05/2011 09:30 PM DUFFY, RL
- 10/05/2011 05:26 PM DUFFY, RL
- 10/05/2011 04:07 PM DUFFY, RL
  - Immunization - Adult
  - Immunization - Previous
  - Histories - OV
  - Patient Portal - Family History
  - Patient Portal - Health Maintenance**
  - Patient Portal Medications and Allergi
  - Patient Portal - Past Medical History
  - Patient Portal - Social History
  - USA Intake-OV
  - USA Protocols
  - Allergy



Yes answers on the Health Maintenance Portal template will be imported to the Order\_Management template—though sometimes the details will be incomplete.

### Medications and Allergies

#### Medications:

Name	Dosage	Notes
ASA	81 mg	1 daily

#### Allergies:

- Amoxicillin
- Aspirin
- Erythromycin
- Ibuprofen
- Insulin
- Penicillin
- Sulfa

#### Other Allergies:

Tetracycline

### Patient History

- Patient Hist...
- Patient Dem...
- Categories
- New
- Lock
- Search
- 10/05/2011 09:30 PM DUFFY, RL
- 10/05/2011 05:26 PM DUFFY, RL
- 10/05/2011 04:07 PM DUFFY, RL
  - Immunization - Adult
  - Immunization - Previous
  - Histories - OV
  - Patient Portal - Family History
  - Patient Portal - Health Maintenance
  - Patient Portal Medications and Allergi
  - Patient Portal - Past Medical History
  - Patient Portal - Social History
  - USA Intake-OV
  - USA Protocols
  - Allergy



**Positive** checkboxes in the Allergy section of the Medications and Allergies Portal template will be imported to the Allergy Module. You will have to enter other allergies & the medication list manually.

Custom

### Social History

What is your tobacco and alcohol history?

Uses tobacco:  CURRENT  NEVER  FORMER  UNKNOWN

Type:   
Number of years:   
Packs per day:   
Tobacco per day:

Ever tried to quit:  YES  NO  
Year quit:

Passive smoke exposure:  YES  NO

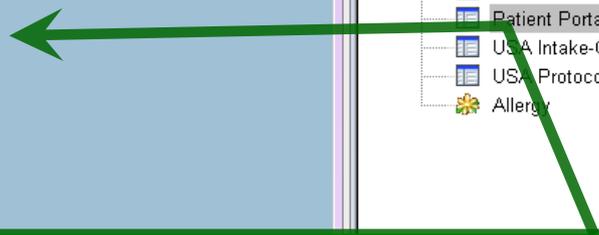
Drinks alcohol:  YES  NO  
Type:   
Frequency:   
Amount:   
Last drink:   
Year quit:

Patient History

- Patient Hist...
- Patient Dem...
- Categories

New Lock Search

- 10/05/2011 09:30 PM DUFFY, RL
  - 10/05/2011 05:26 PM DUFFY, RL
    - 10/05/2011 04:07 PM DUFFY, RL
      - Immunization - Adult
      - Immunization - Previous
      - Histories - OV
      - Patient Portal - Family History
      - Patient Portal - Health Maintenance
      - Patient Portal Medications and Allergi
      - Patient Portal - Past Medical History
      - Patient Portal - Social History
      - USA Intake-OV
      - USA Protocols
      - Allergy



FORMERLY

Most of the answers on the Social History Portal template will be imported to the Social History template—though you'll want to double-check this. As of this writing, there appears to be some inconsistency as to how the tobacco details are imported.

## Chronic Illnesses

Do you have any of the following chronic illnesses?

- Arthritis
- Asthma
- Congestive heart disease
- Depression
- Diabetes Type 1
- Diabetes Type 2
- High blood pressure
- High cholesterol
- Kidney disease
- Seasonal Allergies
- Seizures

Additional Chronic Illnesses

Psoriasis

### Patient History

Folder tree showing patient history items:

- Patient Hi...
- Patient D...
- Categories
- New Lock Search
- 01/12/2012 05:30 PM DUFFY, RL
  - Patient Portal - Chronic Illnesses
  - Patient Portal - Family History
  - Patient Portal - Health Maintenanc
  - Patient Portal Medications and A
  - Patient Portal - Social History
  - USA Nxmd SurgHx
  - Allergy
  - Problem
- 01/12/2012 03:59 PM DUFFY, RL
- 12/09/2011 02:30 PM DUFFY, RL
- 11/08/2011 09:26 AM DUFFY, RL
- 10/06/2011 12:35 PM DUFFY, RL
- 10/06/2011 12:33 PM DUFFY, RL

Most of the check boxes on the **Chronic Illnesses** template will be imported to the **Chronic Problem List**. You'll have to enter anything the patient typed in the **Additional Chronic Illnesses** box manually.

### Chronic Illnesses

Do you have any of the following chronic illnesses?

## To reiterate:

NextGen imports many of these items the best it can, but the import process is often incomplete, & the transition to KBM 8.3 in 2014 may further complicate the picture. It is still the provider's responsibility to review these templates & make any manual additions or clarifications necessary when seeing the patient.

Obviously, we're still ahead of the game at the first visit if the patient has been able to submit this information ahead of time, instead of having to fill out paper forms that have to be reviewed & added to NextGen at the time of the visit.

# Medical Questions

Patients can send us medical questions, & we can respond through the Patient Portal.

Work Flow [Duffy, Robert L]

Appointments 10/ 7/2011 DUFFY, ROBERT LAMAR MD All Tasks

Incoming medical questions will probably be routed to specific users in each clinic, such as a Triage Nurse Group. The Triage Nurse will see the message in the NextMD Communications Inbox.

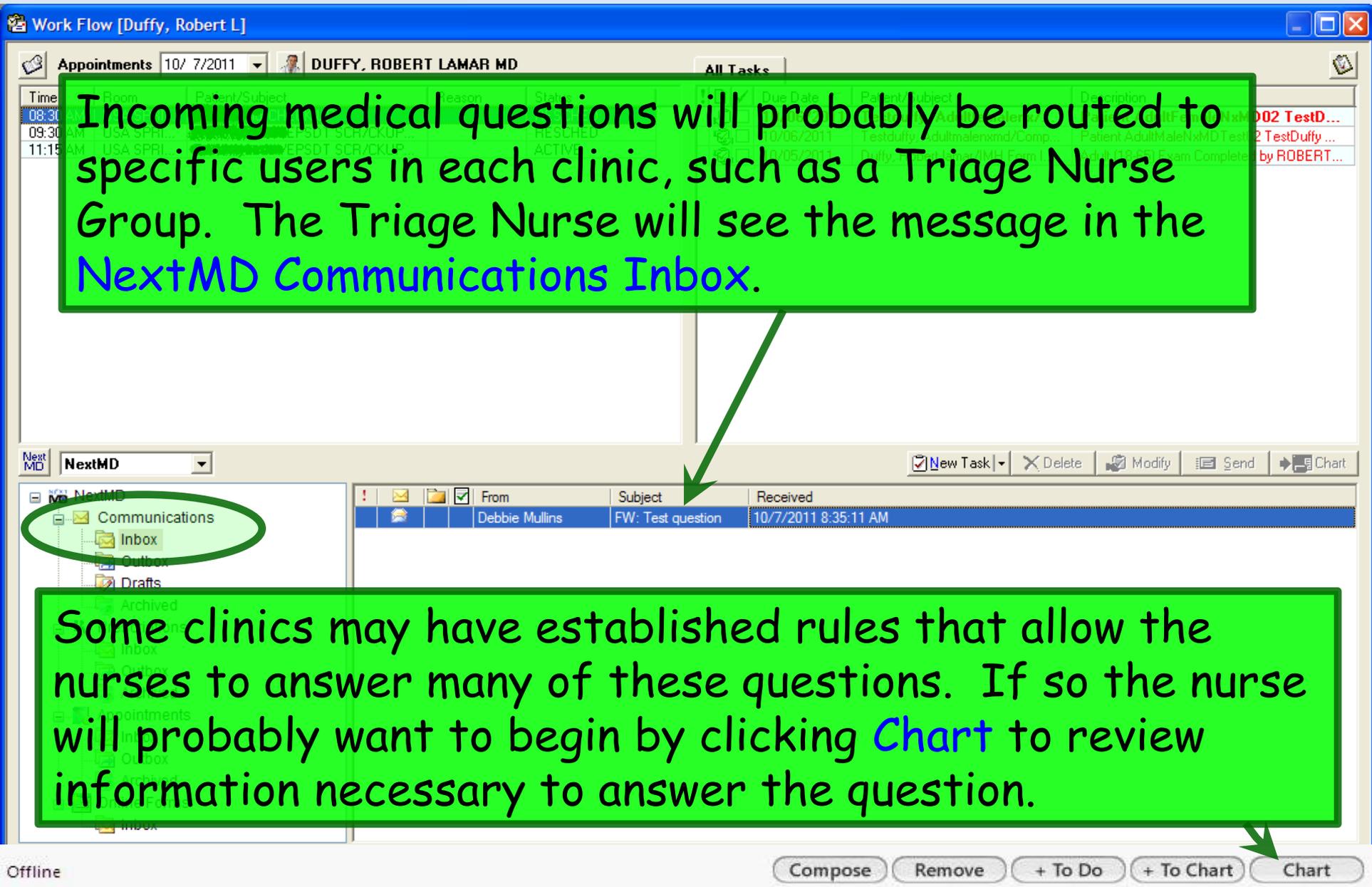
NextMD NextMD

Communications  
Inbox  
Outbox  
Drafts

From	Subject	Received
Debbie Mullins	FW: Test question	10/7/2011 8:35:11 AM

Some clinics may have established rules that allow the nurses to answer many of these questions. If so the nurse will probably want to begin by clicking Chart to review information necessary to answer the question.

Offline Compose Remove + To Do + To Chart Chart



Appointments 10/ 7/2011 DUFFY, ROBERT LAMAR MD

All Tasks

Time	Room	Patient/Subject	Reason	Status	Due Date	Patient/Subject	Description
08:30 AM							
09:30 AM							
11:15 AM							

In other clinics, or in other circumstances, however, the nurse may need to refer the question to a provider. In this case, let's say the nurse has reviewed the chart, & needs to send the question to Dr. Duffy. Begin by double-clicking on the message.

NextMD NextMD

New Task Delete Modify Send Chart

- NextMD
  - Communications
    - Inbox
    - Outbox
    - Drafts
    - Archived
  - Prescriptions
    - Inbox
    - Outbox
    - Archived
  - Appointments
    - Inbox
    - Outbox
    - Archived
  - Online Forms
    - Inbox

From	Subject	Received
Debbie Mullins	FW: Test question	10/7/2011 8:35:11 AM



NextMD Message

Message Attachments

Send Send & Chart Reply Forward Save Add To Chart Send Task Open Chart Priority Complete

Message Properties Attachments

To: Robert Duffy Sent: 10/7/2011 1:34:52 PM

Subject: FW: Test question Received: 10/7/2011 1:35:11 PM

From: Debbie Mullins

For patient AdultMaleNxMDTest02 TestDuffy

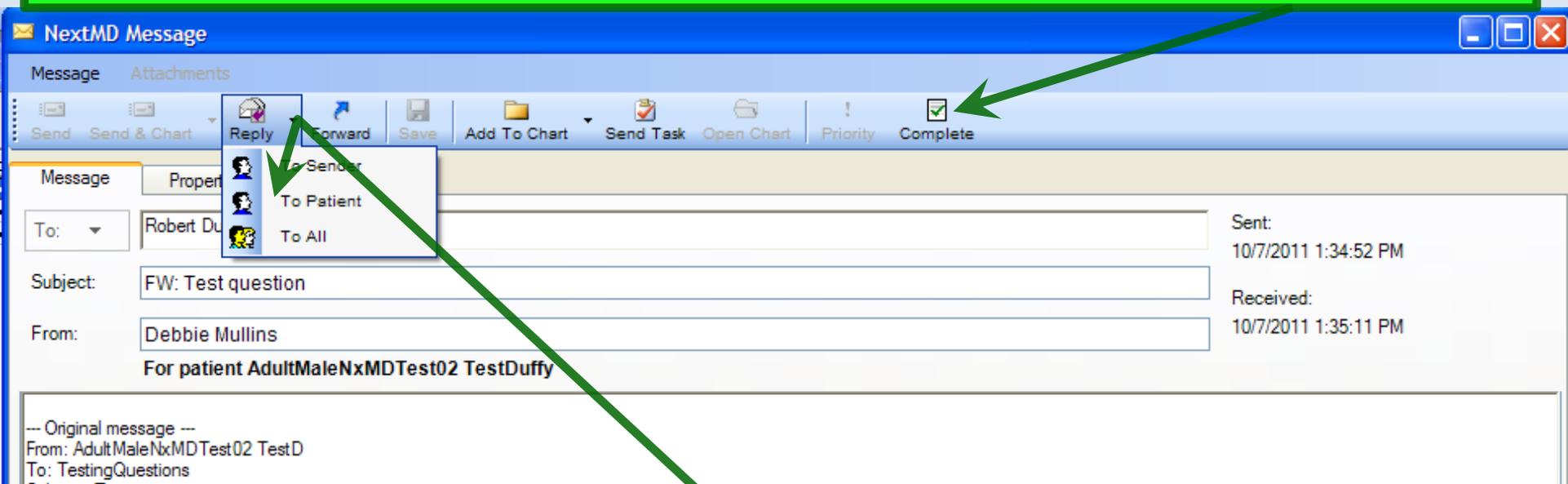
--- Original message ---  
From: AdultMaleNxMDTest02 TestD  
To: TestingQuestions  
Subject: Test question  
Sent: 10/7/2011 12:49:33 AM GMT  
Just a test question. Please forward this to Duffy.

Notice this looks more like conventional Email than the regular tasking function within NextGen. Click the **Forward** button.

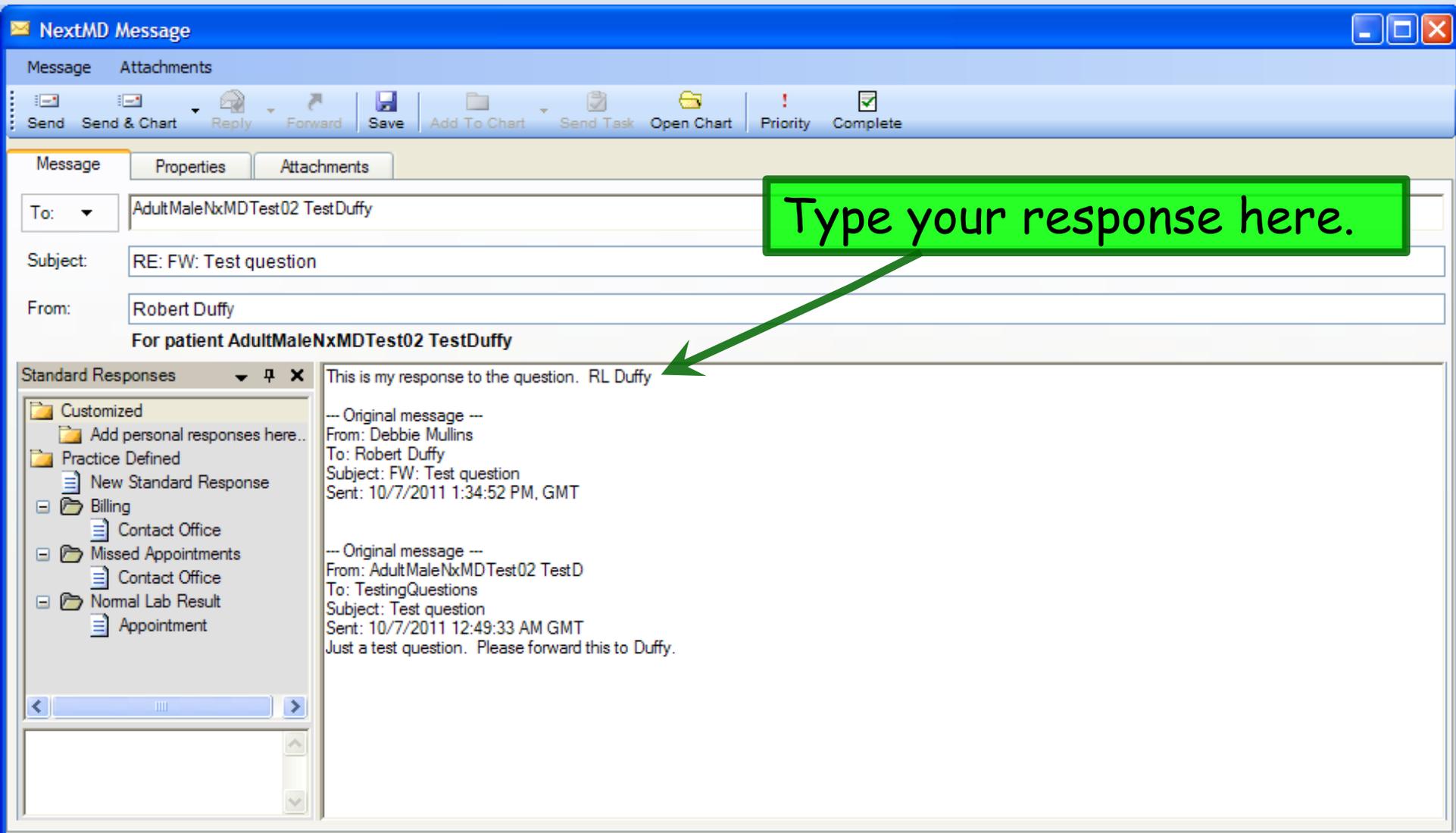
Search for **Duffy**. When the result displays, select it, then click **OK**.

The screenshot shows a 'NextMD Message - [Complete]' window. The message header includes 'Message Attachments', 'Send Send & Chart Reply Forward Save Add To Chart Send Task Open Chart Priority Complete', 'Message Properties Attachments', 'To: [redacted]', 'Subject: FW: Test question', and 'From: Robert Duffy'. Below the header is a 'Standard Responses' pane with a tree view containing folders like 'Customized', 'Practice Defined', 'Billing', 'Missed Appointments', and 'Normal Lab Result'. The main message body shows two 'Original message' entries. Overlaid on top is a 'Select users and groups' dialog box with a search field containing '< Enter search string here >', a 'Search' button, and 'OK' and 'Cancel' buttons at the bottom. A green arrow points from the text in the top box to the 'OK' button in the dialog box.

Whether the question is being answered by the nurse or the provider, the process is the same. But before we respond to the question, note the **Complete** button. If your actions will complete this Portal Task, you may wish to click this button now—note this is a little different from the way you flag regular tasks as “complete.”



Now note the **Reply** button and click the **Dropdown Arrow**. You can choose to send the reply to the patient or to the user who sent you the question. In this case, we'll select **To Patient**.



Type your response here.

To: AdultMaleNxMDTest02 TestDuffy

Subject: RE: FW: Test question

From: Robert Duffy

For patient AdultMaleNxMDTest02 TestDuffy

Standard Responses

- Customized
  - Add personal responses here...
- Practice Defined
  - New Standard Response
- Billing
  - Contact Office
- Missed Appointments
  - Contact Office
- Normal Lab Result
  - Appointment

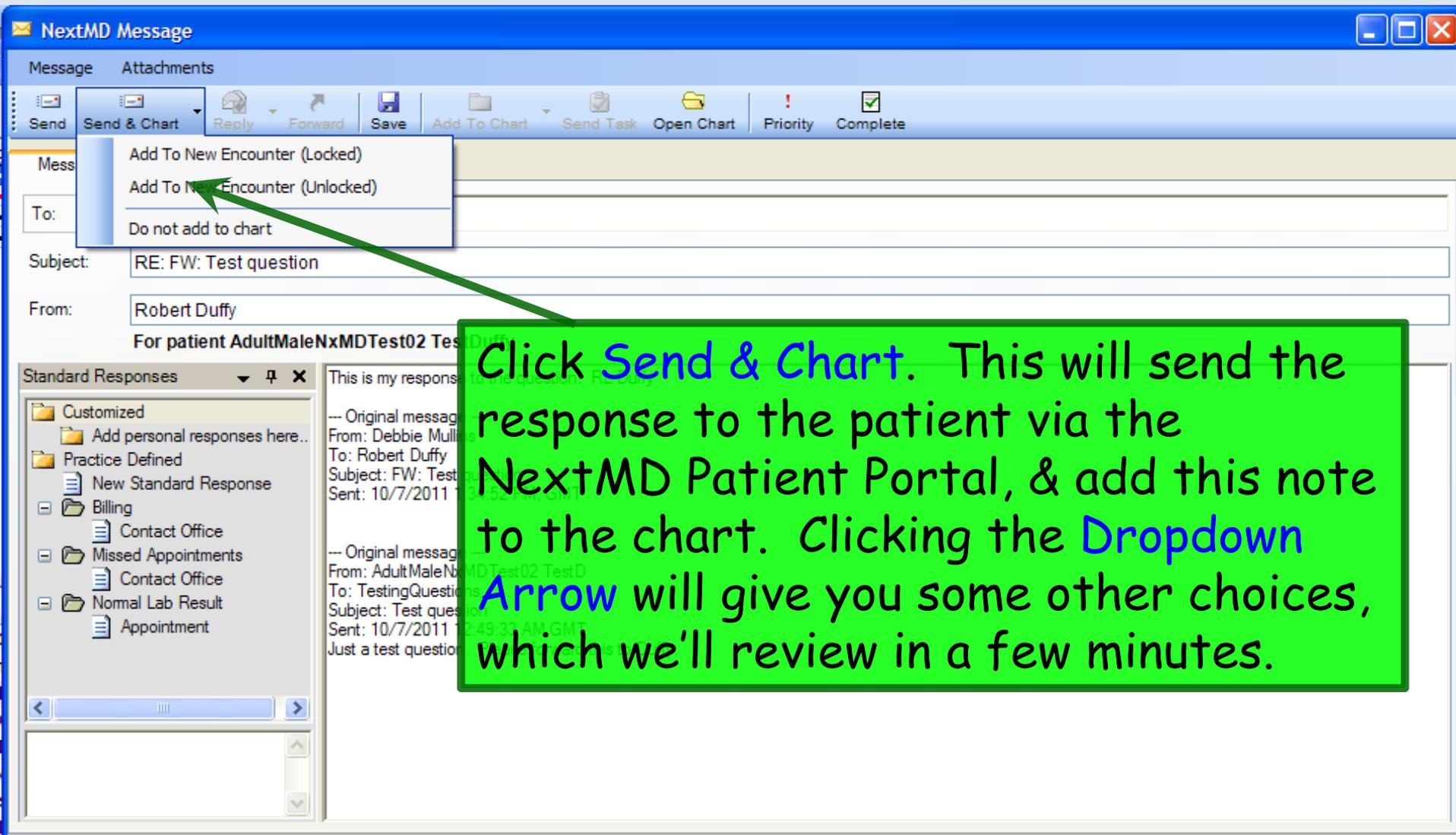
This is my response to the question. RL Duffy

--- Original message ---

From: Debbie Mullins  
To: Robert Duffy  
Subject: FW: Test question  
Sent: 10/7/2011 1:34:52 PM, GMT

--- Original message ---

From: AdultMaleNxMDTest02 TestD  
To: TestingQuestions  
Subject: Test question  
Sent: 10/7/2011 12:49:33 AM GMT  
Just a test question. Please forward this to Duffy.



Click **Send & Chart**. This will send the response to the patient via the NextMD Patient Portal, & add this note to the chart. Clicking the **Dropdown Arrow** will give you some other choices, which we'll review in a few minutes.

Patient History Patient Demo... Categories  
New Lock Search  
10/07/2011 09:10 AM DUFFY, RL  
NextMD E-Mail

**From:** Robert Duffy  
**To:** AdultMaleNxMDTest02 TestDuffy  
**Subject:** RE: FW: Test question  
**Sent:** 10/7/2011 2:10:27 PM GMT

This is my response to the question. RL Duffy

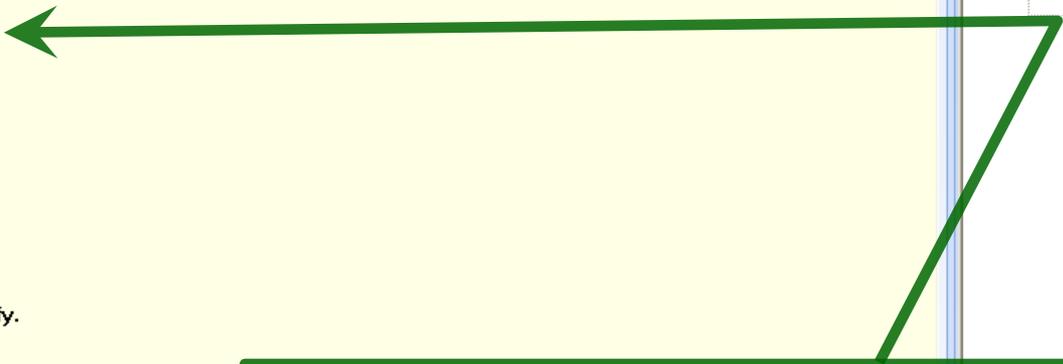
— Original message —

**From:** Debbie Mullins  
**To:** Robert Duffy  
**Subject:** FW: Test question  
**Sent:** 10/7/2011 1:34:52 PM, GMT

— Original message —

**From:** AdultMaleNxMDTest02 TestD  
**To:** TestingQuestions  
**Subject:** Test question  
**Sent:** 10/7/2011 12:49:33 AM GMT  
Just a test question. Please forward this to Duffy.

Document added to chart by: Robert Duffy  
Document generated on: 10/7/2011 9:10:28 AM



Here you see the message that has been added to the encounter.

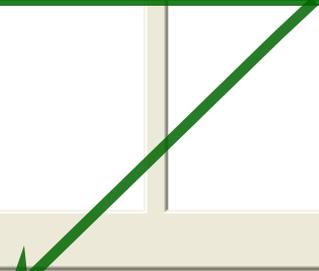
Appointments 10/ 7/2011 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
08:30 AM	USA SPRI...	██████████/CHECK UP		RESCHED
09:30 AM	USA SPRI...	██████████ EPSDT SCR/CKUP...		RESCHED
11:15 AM	USA SPRI...	██████████ EPSDT SCR/CKUP...		ACTIVE

All Tasks

Due Date	Patient/Subject	Description
10/06/2011	Testduffy. Adultfemalenx/...	Patient AdultFemaleNxMD02 TestD...
10/06/2011	Testduffy. Adultmalenxmd/Comp...	Patient AdultMaleNxMD Test02 TestDuffy ...
10/05/2011	Duffy, Robert lamar/IMH Form I...	Adult (18-65) Exam Completed by ROBERT...

If you didn't do it earlier, you can mark this item as "complete" by double-clicking on the message.



NextMD NextMD

New Task | 
  Delete | 
  Modify | 
  Send | 
  Chart

- NextMD
  - Communications
    - Inbox
    - Outbox
    - Drafts
    - Archived
  - Prescriptions
    - Inbox
    - Outbox
    - Archived
  - Appointments
    - Inbox
    - Outbox
    - Archived
  - Online Forms
    - Inbox

From	Subject	Received
Debbie Mullins	FW: Test question	10/7/2011 8:35:11 AM

Offline

Compose | 
  Delete | 
  Add To Do | 
  Add to Chart | 
  Go to Chart

NextMD Message

Message Attachments

Send Send & Chart Reply Forward Save Add To Chart Send Task Open Chart Priority Complete

Message Properties Attachments

To: Robert Duffy Sent: 10/7/2011 1:34:52 PM

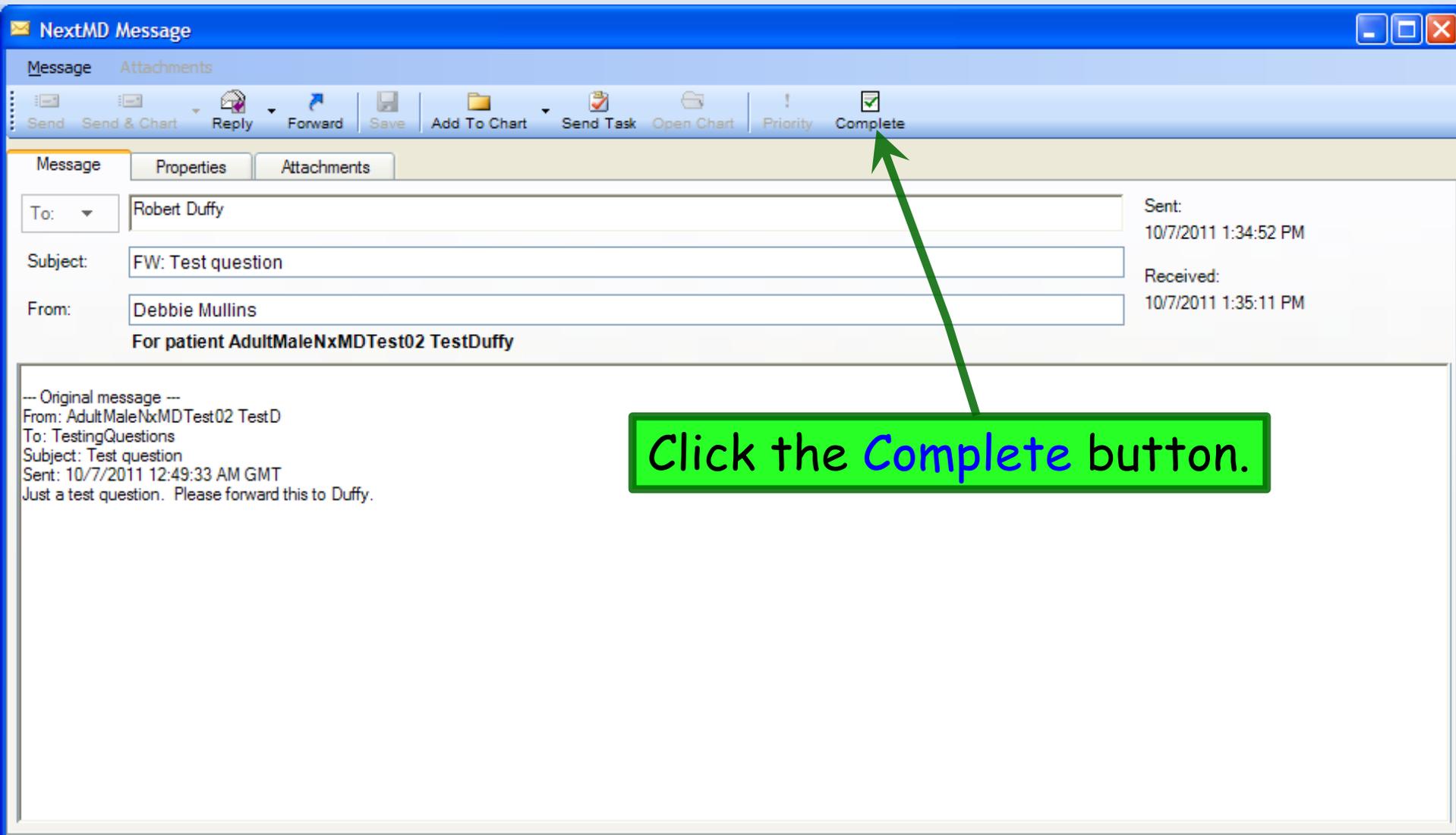
Subject: FW: Test question Received: 10/7/2011 1:35:11 PM

From: Debbie Mullins

For patient AdultMaleNxMDTest02 TestDuffy

--- Original message ---  
From: AdultMaleNxMDTest02 TestD  
To: TestingQuestions  
Subject: Test question  
Sent: 10/7/2011 12:49:33 AM GMT  
Just a test question. Please forward this to Duffy.

Click the Complete button.

The image shows a screenshot of a software window titled "NextMD Message". The window has a blue title bar with standard Windows window controls (minimize, maximize, close) on the right. Below the title bar is a toolbar with several icons and labels: "Send", "Send & Chart", "Reply", "Forward", "Save", "Add To Chart", "Send Task", "Open Chart", "Priority", and "Complete". The "Complete" button, which features a checkmark icon, is highlighted by a green arrow pointing from a green callout box. The callout box contains the text "Click the Complete button." in blue font. Below the toolbar is a tabbed interface with three tabs: "Message" (selected), "Properties", and "Attachments". The main content area displays email header information: "To: Robert Duffy", "Subject: FW: Test question", and "From: Debbie Mullins". To the right of this information, it shows "Sent: 10/7/2011 1:34:52 PM" and "Received: 10/7/2011 1:35:11 PM". Below the header, it says "For patient AdultMaleNxMDTest02 TestDuffy". The bottom section of the window shows the body of the message, starting with "--- Original message ---" and containing the text: "From: AdultMaleNxMDTest02 TestD", "To: TestingQuestions", "Subject: Test question", "Sent: 10/7/2011 12:49:33 AM GMT", and "Just a test question. Please forward this to Duffy."

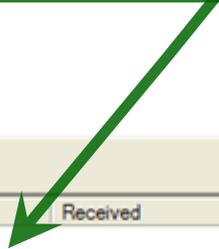
Appointments 10/ 7/2011 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
08:30 AM	USA SPRI...	CHECK UP		RESCHED
09:15 AM	4-WI	/L-KNEE SWOLL...		ATTENDED
09:30 AM	USA SPRI...	/EPSDT SCR/CKUP...		RESCHED
11:15 AM	USA SPRI...	/EPSDT SCR/CKUP...		ACTIVE

All Tasks

	Due Date	Patient/Subject	Description
<input type="checkbox"/>	10/06/2011	Testduffy, Adultfemalenx/...	Patient AdultFemaleNxMD02 TestD...
<input type="checkbox"/>	10/06/2011	Testduffy, Adultmalenxmd/Comp...	Patient AdultMaleNxMDTest02 TestDuffy ...
<input type="checkbox"/>	10/05/2011	Duffy, Robert lamar/IMH Form I...	Adult (18-65) Exam Completed by ROBERT...

The message has now dropped off your list.



- NextMD
  - Communications
    - Inbox
    - Outbox
    - Drafts
    - Archived
  - Prescriptions
    - Inbox
    - Outbox
    - Archived
  - Appointments
    - Inbox
    - Outbox
    - Archived
  - Online Forms
    - Inbox

	From	Subject	Received
--	------	---------	----------

# Messages To Patients

Providers & nurses can, of course, initiate messages to patients. This is a good way to relay lab results, follow-up plans, give appointment reminders, etc.

**Work Flow [Duffy, Robert L]**

Appointments 12/ 9/2011 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
02:33 PM	Exam 1	Testduffy, Adultfemalenxmd01		waiting for pro...

All Tasks Refills Test Results Questions

Due Date	Patient/Subject	Description
----------	-----------------	-------------

To initiate a message to a patient, with the patient's chart open, bring up the Workflow popup & click **Compose**.

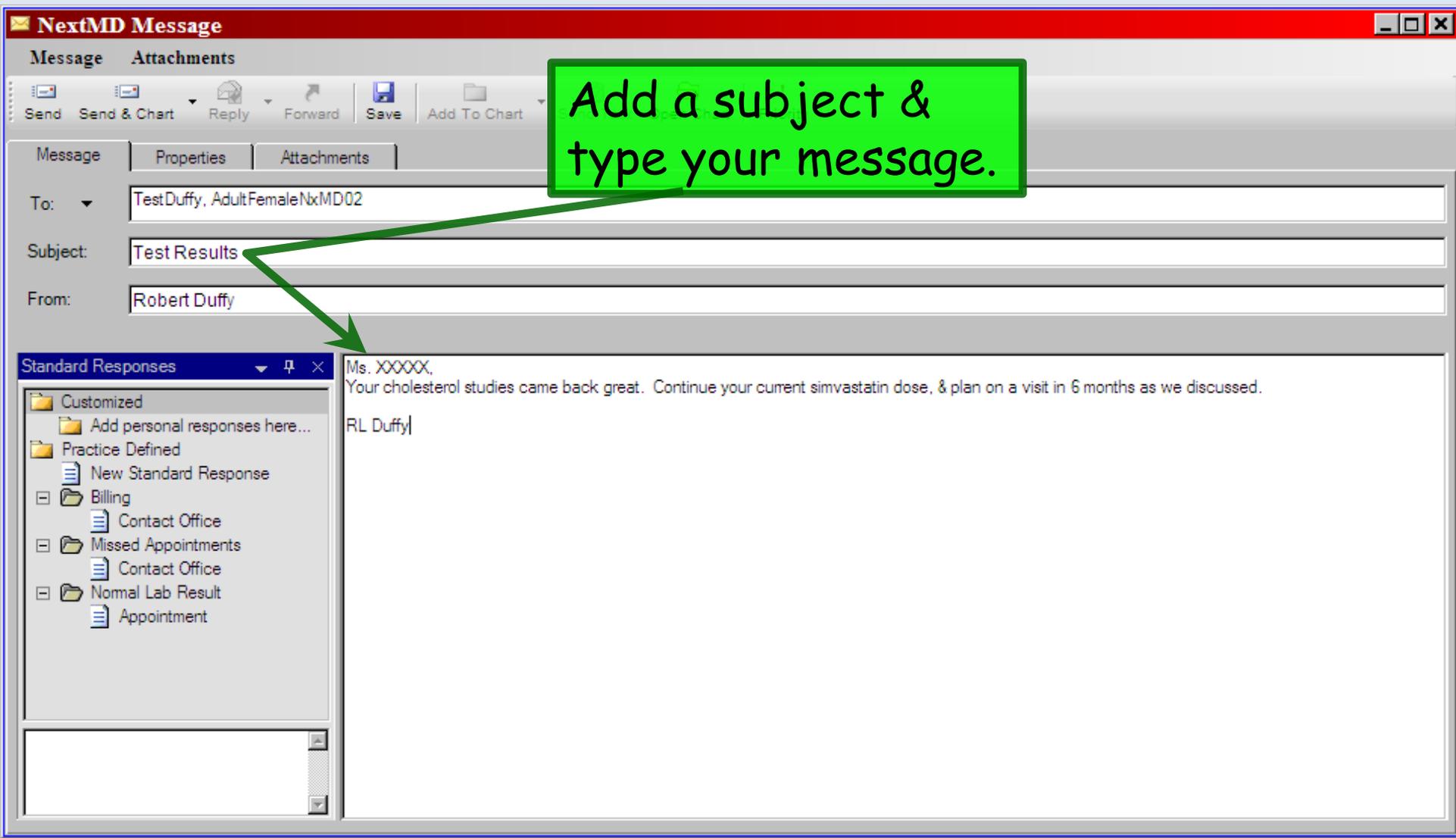
NextMD NextMD New Task Delete Modify Send Chart

From	Subject	Received
------	---------	----------

- NextMD
  - Communications
    - Inbox**
    - Outbox
    - Drafts
    - Archived
  - Prescriptions
    - Inbox
    - Outbox
    - Archived
  - Appointments
    - Inbox
    - Outbox
    - Archived
  - Online Forms
    - Inbox(5)

Click **To** & you'll see the patient's name at the top of the list. Click the **patient's name**.

The screenshot shows a 'Patient Portal' window with a message composition interface. At the top, there is a toolbar with icons for 'Send & Chart', 'Reply', 'Forward', 'Save', 'Add To Chart', 'Send Task', 'Open Chart', and 'Priority'. Below the toolbar are tabs for 'Message', 'Properties', and 'Attachments'. The main area is a 'To:' field with a dropdown menu open, listing several options: 'AdultFemaleNxD001 TestDuffy', 'Add Patient', 'Add User(s)', 'Add Report', 'Add Report (Report Server)', 'Report Filter', and 'Add Original Patient'. A green arrow points from the text in the callout box to the 'To:' field. On the left side, there is a sidebar with a tree view containing folders like 'Billing', 'Missed Appointments', and 'Normal Lab Result', each with sub-items like 'Contact Office' and 'Appointment'. At the bottom left, there is a 'New Standard Response' button and a scrollable list of response options.



Add a subject &  
type your message.

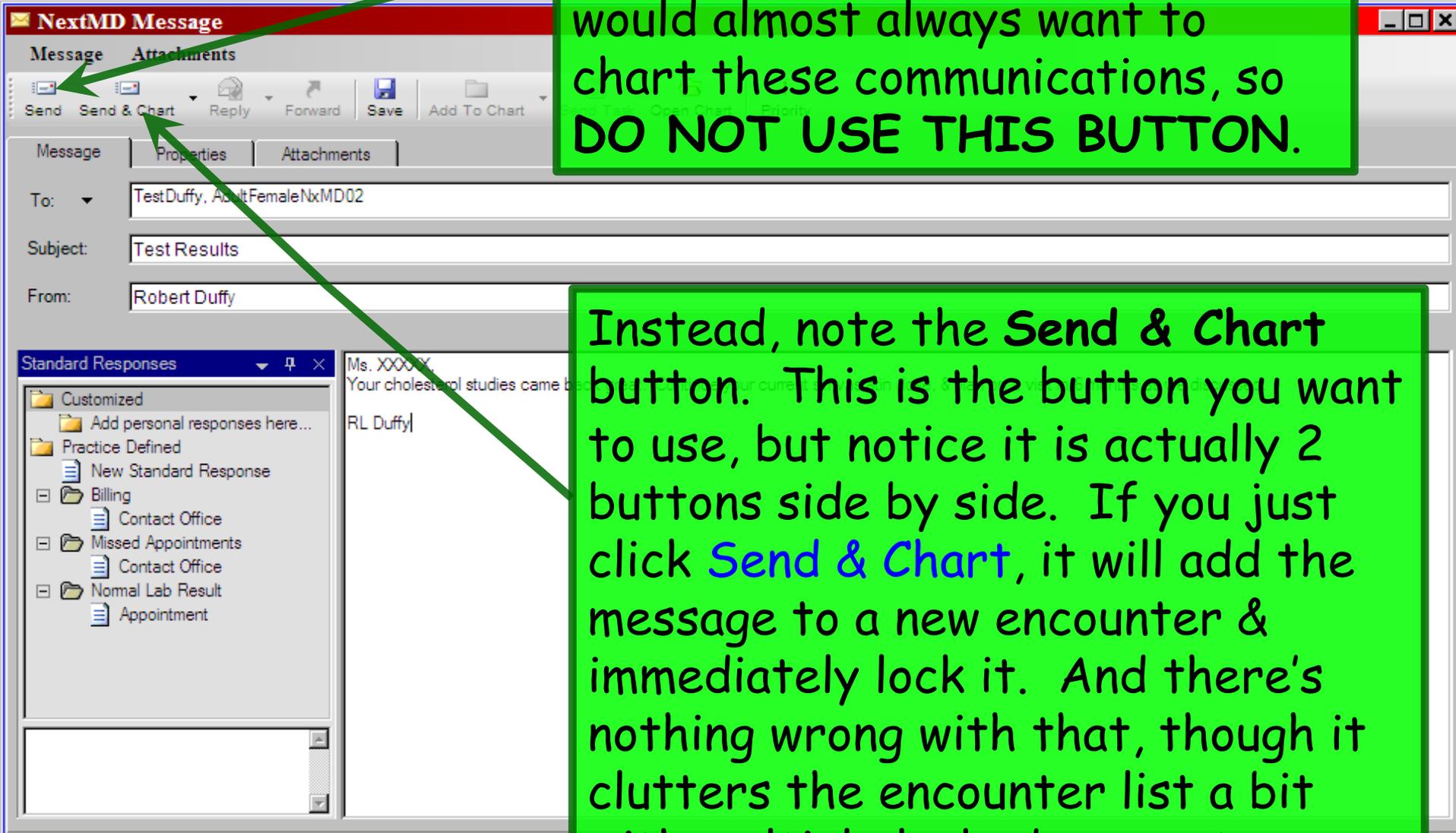
Standard Responses

- Customized
  - Add personal responses here...
- Practice Defined
  - New Standard Response
- Billing
  - Contact Office
- Missed Appointments
  - Contact Office
- Normal Lab Result
  - Appointment

Ms. XXXXX,  
Your cholesterol studies came back great. Continue your current simvastatin dose, & plan on a visit in 6 months as we discussed.  
RL Duffy|

Note the **Send** button. You would almost always want to chart these communications, so **DO NOT USE THIS BUTTON.**

Instead, note the **Send & Chart** button. This is the button you want to use, but notice it is actually 2 buttons side by side. If you just click **Send & Chart**, it will add the message to a new encounter & immediately lock it. And there's nothing wrong with that, though it clutters the encounter list a bit with multiple locked encounters.



However, if you click the **dropdown arrow**, you will have the choice of adding it to a locked or unlocked encounter. "Unlocked" (or an existing encounter when offered) is probably the better choice; it allows you to add other documentation to the encounter, & you can use the same encounter for further entries in this line of conversation.

The screenshot shows a software interface for a "NextMD Message". The window title is "NextMD Message" and it has tabs for "Message" and "Attachments". The "Message" tab is active, showing a toolbar with buttons for "Send", "Send & Chart", "Reply", "Forward", "Save", and "Add To". A dropdown menu is open under the "Add To" button, listing three options: "Add To New Encounter (Locked)", "Add To New Encounter (Unlocked)", and "Do not add to chart". A green arrow points from the text in the adjacent box to the "Add To New Encounter (Unlocked)" option. Below the toolbar, the message header shows "To:", "Subject: Test Results", and "From: Robert Duffy".

At the bottom left, there is a "Standard Responses" panel with a tree view containing folders like "Customized", "Practice Defined", "Billing", "Missed Appointments", and "Normal Lab Result", each with sub-items like "Contact Office" or "Appointment".

The main message body contains the text: "Ms. XXXXX, Your cholesterol st... RL Duffy".

Work Flow [Duffy, Robert L]

Appointments 12/ 9/2011 DUFFY, ROBERT LAMAR MD

Time	Room	Patient/Subject	Reason	Status
02:33 PM	Exam 1	Testduffy, Adultfemalenxmd01		waiting for pro...

All Tasks Refills Test Results Questions

Due Date	Patient/Subject	Description
----------	-----------------	-------------

After sending the message, you're returned to the Workflow popup.

Note that communicating tests results this way can save you additional work, since there would be no reason to duplicate the effort on the Telephone or Provider Test Action template, or send tasks to other staff to attempt to contact the patient.

Offline

Compose Remove + To Do + To Chart Chart

# Medication Refill Requests

Patients can request refills through the Patient Portal. This works in a way similar to Medical Questions.

Incoming refill requests will probably be routed to specific users in each clinic, such as a Triage Nurse Group. The Triage Nurse will see the message in the **NextMD Prescriptions Inbox**.

Due Date	Patient/Subject	Description
10/08/2011	Duffy, Robert lamar/IMH Form Imported	Adult (18-65) E...
10/05/2011	Duffy, Robert lamar/IMH Form Imported	Adult (18-65) E...

NextMD

 New Task  Delete  Modify  Send  Chart

- NextMD
  - Communications
    - Inbox
    - Outbox
    - Drafts
    - Archived
  - Prescriptions
    - Inbox**
    - Outbox
    - Archived
  - Appointments
    - Inbox
    - Outbox
    - Archived
  - Online Forms
    - Inbox(8)

Requested	Patient	Category	Recipient	Patient DOB	Request
9/22/201...	[REDACTED] S...	Renewal of Ongoing Medications	DUFFY, ROBERT	9/9/1974	testing Ne...
9/21/201...	[REDACTED] S...	Renewal of Ongoing Medications	DUFFY, ROBERT	9/9/1974	testing Ne...
9/28/201...	[REDACTED] S...	New Medication Requests	DUFFY, ROBERT	2/20/1959	Second p...

Many clinics may have established rules that allow the nurses to refill some routine meds. If so, the nurse will probably want to begin by clicking **Chart** to review information necessary to answer the question.

Appointments 10/10/2011 DUFFY, ROBERT LAMAR MD

All Tasks		
Due Date	Patient/Subject	Description
10/08/2011	Duffy, Robert lamar/IMH Form Imported	Adult (18-65) E...
10/05/2011	Duffy, Robert lamar/IMH Form Imported	Adult (18-65) E...

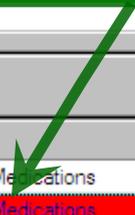
In other clinics, or in other circumstances, however, the nurse may need to refer the question to a provider. In this case, let's say the nurse has reviewed the chart, and needs to send the refill request to Dr. Duffy. Begin by double-clicking on the **message**.

NextMD

New Task Delete Modify Send Chart

- NextMD
  - Communications
    - Inbox
    - Outbox
    - Drafts
    - Archived
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    - Inbox
    - Outbox
    - Archived
  - Appointments
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Requested	Patient	Category	Recipient	Patient DOB	Request
9/22/201...	[REDACTED] S...	Renewal of Ongoing Medications	DUFFY, ROBERT	9/9/1974	testing Ne...
9/21/201...	[REDACTED] S...	Renewal of Ongoing Medications	DUFFY, ROBERT	9/9/1974	testing Ne...
9/29/201...	[REDACTED] S...	New Medication Requests	DUFFY, ROBERT	2/20/1959	Second n...



**Actions**

Respond Add Comment Save Print Forward Send Task Open Chart

**Patient**  
[Redacted]  
[Redacted] (251) [Redacted] (H)  
MOBILE, AL, 36695  
9/9/1974

To: DUFFY, ROBERT  
Category: Renewal of Ongoing Medications

9/21/2011 11:17:14 AM:  
testing NextMD

**Pharmacy**  
Pharmacy Test  
.. (251) 434-3617

Click the Forward button.

**Medications**

<u>Medication</u>	<u>Dose</u>	<u>Requested</u>	<u>Started</u>	<u>Refills</u>	<u>Prescribing Provider</u>
ALLEGRA-D 24 HOUR (FEXOFENADINE/PSEUDOEPHEDRINE)	- * 180 mg-240 mg TAB SR 24H	9/21/2011	8/31/2010	0	SHERI OWENS

**History**

Search for **Duffy**. When the result displays you can add further details if desired in the **Message** section, then click **Send** to forward the request.

**Forward Item**

Forward: Request for renewal of 1 prescription(s) from [redacted]

To: Search users and groups

< Enter search string here > Search

.... (No results)

Enter a search string to begin

Message:

History:

Send Cancel

MOBILE, AL, 36695  
9/9/1974

To: DUFFY, ROBERT

Category: Renewal of Ongoing Medications

9/21/2011 11:17:14 AM:  
testing NextMD

### Medications

#### Medication

ALLEGRA-D 24 HOUR  
(FEXOFENADINE/PSEUDOEPHEDRINE)

### History

(251) 434-3617

<u>Refills</u>	<u>Prescribing Provider</u>
0	SHERI OWENS

Actions









Respond Add Comment Save Print Forward Send Task Open Chart

Patient

██████████ (251) ██████████ (H)

Pharmacy

Pharmacy Test (251) 434-3617

MOBILE, AL, 36695  
9/9/1974

To: DUFFY, ROBERT  
Category: Renewal of Ongoing Medications

Whether the question is being answered by the nurse or the provider, the process is the same. Click **Respond**.

9/21/2011 11:17:14 AM:  
testing NextMD

Medications

<u>Medication</u>	<u>Dose</u>	<u>Requested</u>	<u>Started</u>	<u>Refills</u>	<u>Prescribing Provider</u>
ALLEGRA-D 24 HOUR (FEXOFENADINE/PSEUDOEPHEDRINE)	- * 180 mg-240 mg TAB SR 24H	9/21/2011	8/31/2010	0	SHERI OWENS

History

# Respond to Patient

Send Send & Chart

To:

Address:

MOBILE, AL, 36

You can click here to toggle between "Approved" & "Denied."

## Medications:

Renewal Status	Medication	Dose	Requested
<a href="#">Approved</a>	ALLEGRA-D 24 HOUR (FEXOFENADINE/P...	- * 180 mg-240 mg TAB SR 24H	9/21/2011

## Reply:

### Standard Responses

- Customized
- Add personal responses here
- Practice Defined

I'll send the refill to the pharmacy. If your allergies aren't doing better in the next couple wks, though, make an appt to discuss other options.

You can type further messages here.

**Respond to Patient**

Send **Send & Chart** ▼

To: Add To New Encounter (Locked)

Address: Add To New Encounter (Unlocked)

Add To 9/27/2011 5:57:57 PM

Do not add to chart

Home phone: (251) [REDACTED]

Work phone phone:

Date of birth: 9/9/1974

Click **Send & Chart**. This will send the response to the patient via the NextMD Patient Portal, & add this note to the chart. Clicking the **Dropdown Arrow** will allow you to choose a specific encounter to add it to, or to create a new encounter to add it to.

Standard Responses

- Customized
  - Add personal responses here
- Practice Defined

I'll send the refill to the pharmacy. If your allergies aren't doing better in the next couple wks, though, make an appt to discuss other options.

Patient's Request:  
Requested: 9/21/2011 11:17:14 AM

Pharmacy: Pharmacy Test, .

Item 1: ALLEGRA-D 24 HOUR (FEXOFENADINE/PSEUDOEPHEDRINE), - \* 180 mg-240 mg TAB SR 24H, , started 8/31/2010

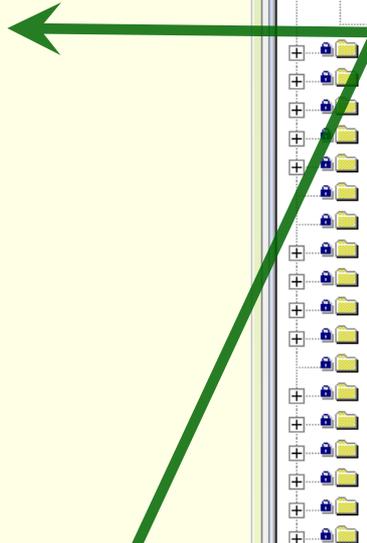
"testing NextMD "

Practice Response:  
Date: 9/27/2011 5:57:57 PM  
Item 1: Unchanged

---

Document added to chart by: Robert Duffy  
Document generated on: 9/27/2011 5:57:57 PM

Patient ...		
Patient ...		
Categori...		
New Lock Search		
09/27/2011 05:57 PM	DUFFY, R	NextMD Med. Renewal Requ
09/27/2011 05:57 PM	DUFFY, R	NextMD Med. Renewal Requ
09/27/2011 03:07 PM	DUFFY, R	
09/21/2011 09:40 AM	DUFFY, R	
08/12/2011 04:30 PM	OWENS,	
07/13/2011 09:13 AM	DUFFY, R	
07/07/2011 01:30 PM	LINDER, M	
06/07/2011 03:00 PM	BROOKS,	
05/10/2011 03:30 PM	BROOKS,	
04/21/2011 08:47 AM	ATKINSOI	
02/18/2011 04:15 PM	OWENS,	
02/18/2011 10:41 AM	BROOKS,	
01/13/2011 03:30 PM	OWENS,	
11/23/2010 10:45 AM	DUFFY, R	
10/18/2010 09:31 AM	MCFADEI	
10/12/2010 10:30 AM	MOTLEY,	
10/01/2010 11:06 AM	ATKINSOI	
09/17/2010 05:23 PM	ATKINSOI	
09/08/2010 05:36 PM	DUFFY, R	
08/23/2010 03:46 PM	DUFFY, R	
08/18/2010 09:41 AM	DUFFY, R	
08/18/2010 10:45 AM	DUFFY, R	



Here you see the message that has been added to the encounter.

The program knows whether you've read or replied to the requests, & will "complete" the task for you when you've replied. Though somewhat inconsistent with tasking behavior elsewhere, it saves you from having to manually mark the task as "complete." If you right-click in the **Prescription Inbox**, you can choose whether or not to display "Read" or "Replied-To" items. If these are unchecked, the item drops off your list when you've read/replied to it.

NextMD

- NextMD
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    - Inbox
    - Outbox
    - Archived
  - Online Forms
    - Inbox(8)

Requested	Patient	Category	Recipient	Patient	Request
<div data-bbox="521 821 1014 1170"><ul style="list-style-type: none"><li>Open</li><li>Refresh Now F5</li><li>Delete Del</li><li>Go To Chart</li><li>Add To Encounter</li><li>Send Task To ...</li><li><b>Include Read Items</b></li><li><b>Include Replied-To Items</b></li></ul></div>					

Rx Medications Module White Grid Preferences 52 year Old Female No eligibility status

Last Audit	Status	Medication Name	Generic Name	Start Date	Stop Date	Sig
Status: Active (2 items)						
	Active	Imitrex 100 mg Tab	SUMATRIPTAN SUCCINATE	08/10/2011		1 at onset of migraine; may repeat in 2 hrs if needed, up to
	Active	amitriptyline 50 mg Tab	AMITRIPTYLINE HCL	01/10/2011		1 daily at bedtime

Prescribe New Print Erx Renew Interactions Stop Education Dose Range Delete Eligibility Medication History

Max. daily dose not checked - Unable to calculate from FDB data.

**amitriptyline 50 mg Tab**

Sig: 1 daily at bedtime [Remove Sig](#)

Quantity:  Units:  Refills:   Dispense As Written

Start:  Stop:  Duration:   Prescribed Elsewhere Site:

Patient History

- Patient ... Patient ... Categori...
- New Lock Search
- 10/11/2011 08:55 AM DUFFY, R
    - NextMD Med. Renewal Requ
  - 10/06/2011 04:05 PM DUFFY, R
  - 10/06/2011 01:39 PM DUFFY, R
  - 10/04/2011 02:30 PM DUFFY, R

Note that just responding to the request doesn't actually generate the prescription. You still need to go to the **Medication Module** to refill & ERx (or print/fax) the prescription.

# This concludes the NextGen Patient Portal demonstration.

If everything seems to be going well, you  
have obviously overlooked something.